



Homeownership Education and Counseling Initiative

Housing Counseling Training and Certification
Request for Proposals

Date of Publication: Friday, January 22, 2010

Response Due Date: Friday, February 5, 2010 by 3:00 EST

Comments, Questions, Concerns: ifpn@ihcda.in.gov

Summary and Background

Purpose of Request for Proposals.

Indiana Housing and Community Development Authority (“IHCDA”) requests proposals from organizations to provide training and administer certification for organizations and individuals that provide pre-purchase and foreclosure counseling in Indiana.

About the Indiana Housing and Community Development Authority.

Mission Statement

IHCDA’s mission is for every Hoosier to have the opportunity to live in safe, affordable, good-quality housing in economically stable communities. IHCDA believes that growing Indiana’s economy starts at home.

Overview

IHCDA was created in 1978 by the Indiana General Assembly and is a quasi-public financially self-sufficient statewide government agency. IHCDA’s programs are successful in large part because of the growing network of partnerships we have established with local, state, and federal governments, for-profit businesses and not-for-profit organizations. For-profit partners include investment banks, mortgage lenders, commercial banks, corporate investment managers and syndicators, apartment developers, investors, homebuilders, and realtors. Not-for-profit partners include community development corporations, community action agencies, and not-for-profit developers. For more information, please visit: <http://www.in.gov/ihcda/>.

Summary of HomeEC, Indiana Foreclosure Prevention Network and 1-877-GET-HOPE

In 2002, the Homeownership Education and Counseling Initiative (“HomeEC”) was launched to organize a system of homeownership education that would meet the needs of Indiana homebuyers. Based on the premise that homeownership education and counseling programs are a critical step for successful homeownership, the HomeEC initiative has two overarching themes:

1. To ensure homeownership education and counseling programs are accessible to the entire state; and
2. To ensure education and counseling programs are of the highest quality, offering agreed-upon core elements and meeting agreed-upon minimum standards.

Another component of HomeEC was the creation of a statewide certification system for pre-purchase and post-purchase/foreclosure counseling. For more information on HomeEC training and certification, please visit www.ifpn.info.

In 2007, Indiana began addressing the problem of foreclosure with the launch of a major statewide

initiative to assist Hoosiers in danger of losing their homes. The Indiana Foreclosure Prevention Network (“IFPN”) was developed by a coalition of community organizations, housing-related agencies, government agencies, lenders and banks.

Through this partnership of the public, private and nonprofit sectors, a toll-free helpline, 1-877-GET-HOPE was established (the “Helpline”). The Helpline is available seven (7) days a week, from 8 a.m. to 8 p.m. For a homeowner who may be at risk of foreclosure, the Helpline provides access to free and confidential financial consulting with no obligation or commitment. When a homeowner calls, Helpline operators listen to the homeowner’s issues, and then refer the homeowner to a certified foreclosure intervention specialist working for a counseling agency within the IFPN (a “Network Agency”), if appropriate. For more information, please visit: www.877gethope.org.

All Network Agencies and their staff who participate in foreclosure counseling must be trained and certified through HomeEC as a condition of being part of the IFPN.

Scope of Work

Overview of Services and Responsibilities.

Contractor shall provide training and certification for organizations and individuals wishing to be certified through HomeEC, both for pre-purchase and foreclosure counseling. Contractor shall also provide additional training opportunities for certified counselors at Network Agencies.

Specific Services and Responsibilities.

Contractor's services to be delivered under the contract awarded under this Request for Proposals ("RFP") shall include:

- Provide a sufficient number of trainings to educate trainees in all areas of pre-purchase, mortgage default and foreclosure education and counseling, with the general goal of increasing the number of state-certified pre-purchase housing counselors and foreclosure intervention specialists.
- Work with NeighborWorks America to plan training to enable counselors to provide all levels of counseling, as described in the National Foreclosure Mitigation Counseling Program Grant Agreement.
- Adhere to a specific schedule of trainings, which will be agreed-upon as part of Contractor's contract with IHCD. At a minimum, Contractor shall hold no less than 30 trainings throughout 2010. The breakout of these trainings will be as follows:
 - o Two 5-day trainings, the first to be held in the first half of the year and the second to be held in the second half of the year (both in Indianapolis).
 - o Four 2-day trainings, one to be held in each quarter of the year (all in Indianapolis).
 - o Nine 1-day regional trainings, to be held three times in each of the three regions (central, south and north).
 - o Two 1-day trainings, to be held in Indianapolis, one each half of the year.
 - o Thirteen one-to-two hour supplemental trainings, either via teleconference or webinar.
- Contractor is responsible for working with IHCD staff to inform trainees of these training opportunities/requirements at the earliest possible opportunity.
- Manage the certification and re-certification systems for state certified HomeEC pre-purchase and foreclosure prevention counselors. This includes updating and tracking pre-purchase and foreclosure prevention education continuing education units ("CEUs") of and advise counselors regarding their CEU requirements to maintain their certification.
- Issue counselor certifications to all counselors completing all training programs and organizations meeting the requirements to become state certified pre-purchase or foreclosure intervention specialists, counselors or organizations.
- Update and provide the list of state certified housing counselors and organizations to IHCD on a monthly basis.
- Provide, in the first quarter of the year, an updated certification and training handbook for counselors, organizations and other interested parties.
- Work in a professional manner, and coordinate delivery of services as necessary, with the firm that is awarded the IFPN Technical Assistance contract from IHCD pursuant to the RFP for Technical Assistance dated January 22, 2010

Requirements for Proposal Response

The application package consists of one (1) original proposal and two (2) copies. THE APPLICATION PACKAGE MUST BE SIGNED. The deadline for accepting applications is 3:00 PM, Eastern Standard Time, on Friday, February 5, 2010. All responses received on or before the deadline will be reviewed for selection. Mail submissions to the following address:

IFPN Manager
Indiana Housing & Community Development Authority
30 S. Meridian Street, Suite 1000
Indianapolis, IN 46204
Attention: HomeEC and Counseling Training RFP

A complete response includes the information listed below. Responses received without all of the items will be considered incomplete, and will be withdrawn from consideration.

- 1) Name, address, phone number, fax number, email address, and brief description of firm (1-2 pages).
- 2) Résumés of key personnel to be assigned to this project, highlighting skills, abilities, and knowledge relating to the delivery of the proposed services listed in the “Scope of Work” section (See page 4 of this RFP) (1-3 pages).
- 3) A one (1) page narrative as to firm’s skills, abilities, and knowledge relating to the delivery of the proposed services listed in the “Scope of Work” section (See page 4 of this RFP) (1 page).
- 4) Three (3) or more firm references (1 page).
- 5) Description of services provided to or for IHCD A within the past five (5) years by firm (1-2 pages).
- 6) Description of services to be provided by the firm for this RFP (2-4 pages).
- 7) Cost of providing services listed in the Scope of Work (See page 4 of this RFP) (1-2 pages). Note that the costs should only include firm’s staff time and other costs for training and certification. Costs specifically related to trainings (food, room rental, materials, contract trainers, etc.) will be determined by firm and IHCD A prior to March 1, 2010 and included in the contract.
- 8) Financial statements for previous two (2) years, preferably audited (2-3 pages).

Evaluation Criteria

IHCDA will evaluate responses on the following rubric (maximum score of 40 points) shall include:

<u>Criteria</u>	<u>Total Possible</u>	<u>Total Awarded</u>	<u>Evaluator's Comments</u>
1. Compliance with all items set forth in the "Requirements for Proposal Response" section	2 points maximum		
2. Skills, abilities, and knowledge of key personnel to be assigned to the project relating to the delivery of the services set forth in the "Scope of Work" section	8 points maximum		
3. Skills, abilities, and knowledge of firm relating to the delivery of the services set forth in the "Scope of Work" section	5 points maximum		
4. Firm's references, financial standing and past record of performance on IHCDA contracts over the past five (5) years	9 points maximum		
5. Firm's plan on providing training and certification services	5 points maximum		
6. Cost to provide all services set forth in the "Scope of Work" section	9 points maximum		
7. Firm is an Indiana based organization, employing primarily residents of Indiana	2 points maximum		
	40 points maximum		

Timeline

Solicitation and Publication of Request for Proposals	Friday, January 22, 2010
Deadline for Proposal Submission*:	Friday, February 5, 2010 by 3:00pm EST
Execute contract with selected provider**:	March 1, 2010
Contract end date:	February 28, 2011

** Respondents will be notified by mail and/or email stating if they are awarded the contract or not.*

*** PLEASE NOTE: A copy of the IHCD Contract Boilerplate is attached as Exhibit A to this RFP. By submitting a response to this RFP, respondent acknowledges the acceptance of the IHCD Contract Boilerplate and the understanding that such Boilerplate is non-negotiable.*

Terms and Conditions

This request is issued subject to the following terms and conditions:

1. IHCD A expressly reserves the right to modify or withdraw this RFP at any time, whether before or after any responses have been submitted or received.
2. IHCD A reserves the right to reject and not consider any or all firms that do not meet the requirements of this RFP, including but not limited to: incomplete responses and/or responses offering alternate or non-requested services.
3. IHCD A reserves the right to reject any or all firms, to waive any informality in the RFP process, or to terminate the RFP process at any time, if deemed to be in its best interest.
4. A copy of the IHCD A Contract Boilerplate is attached as Exhibit A to this RFP. By submitting a response to this RFP, respondent acknowledges the acceptance of the IHCD A Contract Boilerplate and the understanding that such Boilerplate is non-negotiable.
5. In the event the party selected does not enter into the required agreement to carry out the purposes described in this RFP, IHCD A may withdraw the selection and commence negotiations with another party.
6. In no event shall any obligations of any kind be enforceable against IHCD A unless and until IHCD A and respondent enter into a written agreement.
7. Each respondent agrees to bear all costs and expenses of its response and there shall be no reimbursement for any costs and expenses relating to the preparation of responses submitted hereunder or for any costs or expenses incurred during negotiations.
8. By submitting a response to this RFP, each respondent waives all rights to protest or seek any remedies whatsoever regarding any aspect of this RFP, the selection of a respondent or respondents with whom to negotiate, the rejection of any or all offers to negotiate, or a decision to terminate negotiations.
9. IHCD A reserves the right not to award a contract pursuant to this RFP.

Prior to the submission deadline, please direct all communication regarding the RFP, including questions and requests for additional information, to the following email address: ifpn@ihcda.in.gov. Communication to other IHCD A email accounts or telephone calls will not be answered, and you will be directed to the ifpn@ihcda.in.gov email address.